

# Mobilization/ Deployment Preparations Guide

This guide should be used to prepare soldiers and families for mobilization/deployment. Additionally, soldiers and families should be offered informational briefings to include, but not limited to:

- DEERS/RAPIDS
- Health Benefits
- Available Financial Assistance
- Available Legal Assistance
- Soldier and Family Sponsorship
- Family Readiness Groups

Leaving your family, your home, your employment, and your property can create enormous financial, legal, and personal complications, unless adequate records and documents are established and safeguarded. Maintaining personal records are important to you, not only for mobilization. They should be kept in a safe place, readily available to you, and in your absence to your spouse, next of kin, or executor. It is recommended that you use this checklist to record information or list where your documents are kept.

For your family members to obtain identification cards and legal benefits, you must provide those documents indicated by an asterisk (\*) to your unit upon request or on mobilization. The documents should be located now and kept available at all times.

The records and documents listed in the remainder of this pamphlet are not all inclusive. Some have short explanations and others are named to assist you and your dependents.



## ☐ YOUR WILL AND TESTAMENT

A last will and testament is a legal declaration as to the manner in which you would like to have your property or estate disposed of after your death. This document can also name someone to serve as legal guardian for your minor children and to serve as your personal representative to settle the affairs of your estate. You may consult an attorney during pre-mobilization legal counseling to determine whether you should have a will. It may be important to have a will regardless of your military, financial, or marital status. Remember, wills can usually be changed very easily. You should see your attorney about preparing or changing your will or your spouse's will. Your attorney and you should consider the effects of your state's laws concerning estate planning.

## ☐ YOUR SPOUSE'S WILL AND TESTAMENT

## ☐ POWER OF ATTORNEY

A Power of Attorney is a legal instrument, which gives another person the authority to act for you in matters relating to your responsibilities and obligations. You may consult with an attorney during pre-mobilization legal counseling to determine if you should have a power of attorney prepared. This power of attorney may be signed at the time of mobilization giving someone you trust the authority to act for you in your absence in matters relating to your responsibilities and legal obligations. Your attorney can advise you concerning this "power of attorney."

## ☐ BIRTH CERTIFICATES

\* Certified copies of birth certificates for your children. (Pre-enrollment in DEERS will delete this requirement.)

## ☐ GUARDIANSHIP DOCUMENTS

\* Adoption or legal guardianship documents.

## ☐ MARRIAGE LICENSE

\* Certified copies of your marriage license or certificate. (This document is required to obtain dependent ID card.)

## ☐ **SERVICE ORGANIZATIONS**

Names and addresses of fraternal or service organizations, with a list of benefits receivable from membership. Upon mobilization, you may want to arrange suspension of membership dues.

## ☐ **HOME IMPROVEMENTS**

All evidence relating to home improvements or real property value enhancement.

## ☐ **REAL ESTATE DOCUMENTS**

Deeds or other title documents to real estate and real property, to include mortgages, deeds of trust, abstracts of title (and the names and addresses of the holders of such deeds and abstracts), title insurance policies, and copies of notes payable relating to the property. It may be wise to have at least your home (and perhaps other property) owned jointly with your spouse for estate and tax purposes. However, you should consult with a lawyer before establishing joint ownership of housing. Under current tax law, if you sell your home and don't acquire another within 18 months, there may be capital gain consequences if your home is valued at more than you paid for it. Be aware that 26 USC 1034 (h) extends this period up to 4 years, with limited exception. Thus, it's important for you to keep all records pertaining to home improvements, modernization, or landscaping, etc., all of which are part of your cost basis.

## ☐ **PERSONAL PROPERTY CERTIFICATES**

Certificates of title, registration, warranties, and tax receipts for automobiles, boats, recreational vehicles, and other personal property. The names of the persons entitled to your car should be shown on your certificate of title. You should determine the disposition to be made of your car upon your mobilization. If the car is to be kept but not used for business purposes, discuss possible premium reduction with your insurance agent. If upon mobilization, contract purchase payments cannot be made, see paragraph 4.3 DA Pamphlet 27-166 (Soldiers' and Sailors' Civil Relief Act).

## ☐ **RENTAL CONTRACTS**

All documents relating to your financial obligations concerning the purchase or rental of real property to include leases, rental contracts, purchase contracts, installments, sales contracts, copies of notes payable, and copies

of payment and date schedules where appropriate. If you lease your home or business property, upon mobilization you may want to consider canceling the lease or renegotiating it to include subletting options.

## ☐ **OTHER ASSETS**

Stocks, bonds (together with buy-and-sell orders); certificate of deposit; savings account passbooks; notes receivable; and other evidence of ownership of real, intangible, personal income-producing property should be kept together, identified, and maintained in your safe deposit box or elsewhere as recommended by your lawyer. Coupon bonds should be exchanged for registered bonds, if possible. These items should be matters of discussion in preparing your will. Consider naming a custodian or trustee(s) to handle income, who will determine the purchase or sale of assets for your account and instructions relating to keeping you informed of activity.

## ☐ **OTHER PERSONAL PROPERTY**

All copies of bills of sale of major items of personal property not otherwise included in above paragraphs.

## ☐ **BUSINESS PLANS AND AGREEMENTS**

Business agreements to include partnership documents, agency or sales contracts, royalties or residual agreements, and employment contracts. If you're self-employed, active files and accounts should be well organized and someone should be named to take over on mobilization. Include Business Care Plans for Health Care Professionals. On mobilization, you should consider notifying customers and suppliers of any change of address to which remittance, orders, invoices, etc. will be delivered.

## ☐ **OTHER BUSINESS INTERESTS**

Evidence of beneficial interest in any business or joint venture.

## ☐ **OTHER DOCUMENTS**

Copies of all documents designating you as an executor or a trustee.



## ☐ **EMPLOYMENT RECORDS**

Copies of military and other employment records.

## ☐ **PARENT INFORMATION**

Full legal names, places and dates of birth, and location of marriage record of your parents.

## ☐ **LIST OF HOME ADDRESSES**

Chronological list of your places of residence (including dates).

## ☐ **PERSONAL SCHOOL HISTORY**

Names and addresses of schools you attended, with dates of attendance, and graduation or enrollment date.

## ☐ **PROOF OF CITIZENSHIP**

This could include a Birth Certificate, Passport, Certificate of Naturalization or Alien Registration Card.

## ☐ **DIVORCE PAPERS**

Copies of divorce or annulment decrees from prior marriages (you and your present spouse) with documents relative to alimony and child support. Decide what effects your orders to duty would have on alimony or child support payments which may or may not have been addressed in divorce, legal separation, annulment, child support, and property settlement decrees and consider amending the decrees as they may pertain to your circumstances upon mobilization.

## ☐ **DEATH CERTIFICATES**

Certified copies of death certificates of members of your immediate family.

## ☐ **SOCIAL SECURITY NUMBERS**

A list of social security numbers for you, your spouse, children, and other family members.

## ☐ **CREDIT CARD ACCOUNTS**

A list of all credit card accounts, account numbers, and mailing addresses.

## ☐ **INCOME TAX RECORDS**

Copies of your Federal and State income tax records for the last five years.

## ☐ **INSURANCE POLICIES**

Copies of insurance policies including life, home, auto, liability, credit life, health, and disability with a list of effective premium dates, agents of record and the home office address for each insuring company. Keep your policies in one place with a cover list. Check the policies with your insurance advisors and review them to see whether they give adequate coverage, list dates, and provide for payments of premiums upon your mobilization. Certain commercial life insurance policies payments may be covered under Federal law. See paragraphs 5.1 through 5.10, DA Pamphlet 27-166 (Soldiers' and Sailors' Civil Relief Act).

## ☐ **BANKING INFORMATION**

List of names, addresses, and account numbers of your saving and loan associations, banks, trust or holding accounts, safe deposit boxes, and institutions holding certificates of deposit on file in your name. Upon mobilization, you might consider making joint bank and savings accounts with your spouse or parents and you should notify the institutions where to send statements.

## ☐ **EMPLOYER INFORMATION**

Name and address of employers with a list of employment benefits such as dependent health care, pension, or profit sharing plans. Upon receiving alert for mobilization, you will want to discuss with your employer, your intention to return to work after completion of military duty. Legal reemployment rights are described in DA Pamphlet 135.2 (Briefing on Reemployment Rights of Members of the Army National Guard and the US Army Reserve).

## ☐ **PROFESSIONAL ASSOCIATIONS**

Name and address of union or professional association (e.g. Bar Association) and date of union/association membership, together with evidence of membership and status. Upon mobilization membership dues may be suspended or adjusted.

## ☐ MEDICAL STATEMENTS

\* If you have an unmarried child over 21, who is incapable of self-support because of mental or physical incapacity that existed before age 21, the following is needed: Statement from a licensed physician certifying medical condition, which includes whether condition is temporary or permanent. If temporary, physician should estimate the expected length of incapacity. Documentation must be forwarded to DFAS for determination.

## ☐ CHILDREN'S SCHOOL DOCUMENTATION

\* Name and location of places where unmarried children (including adopted or stepchildren) over 21, but under 23 years of age, are enrolled in a full-time course of instruction. (This information will be required to obtain dependent ID cards.) If you're paying tuition for your spouse or family members on mobilization, you will want to determine what arrangements can be made for tuition abatement or financial assistance. You must also have documentation to verify attendance at the appropriate school/institution. School documentation is a letter from the registrar or other officials stating student is enrolled full time (12 credit hours per semester for undergraduate, 9 for graduate) and expected date of graduation.

## ☐ CUSTODY ORDERS/PREVIOUS MARRIAGE

\* Copy of any court order giving you legal custody of any children from a previous marriage. (This document will be required to obtain dependent ID cards).

## ☐ CUSTODY ORDERS/OTHER CHILDREN

\* For illegitimate children, copy of a court order naming you the natural parent of the child, a copy of the court decision that you contribute to the child's support. (This document will be required to obtain dependent ID cards.)

## ☐ DEPENDENT IDENTIFICATION CARD

\* All family members 10 years of age or older must obtain an ID card for medical, dental, PX, commissary and other military privileges.

## ☐ HEALTH RECORDS

Record of your health history to include a record of past illnesses or injuries with names and addresses of doctors and hospitals.

## ☐ VOTER REGISTRATION

Address of your registrar of voter. After mobilization you will want to arrange for absentee ballots to be sent to your military address by sending the registrar on SF-76 (Application for Absentee Ballot).

## ☐ RECORD OF TAXING AUTHORITIES

Record the addresses of all taxing authorities (county assessor, IRS, State income tax, motor vehicles, etc.). Upon mobilization you will want to ensure that all taxes are paid to date, and notify the taxing authorities where further tax bills should be sent. Extension of time to pay certain taxes may be granted under the Soldier's and Sailor's Civil Relief Act.

## ☐ OTHER IMPORTANT CONTACTS

List the names and addresses of all special persons (family, lawyer, business associates, etc.) who are not listed elsewhere. Upon mobilization you may desire to mail them a change of address notification.

## ☐ BURIAL INSTRUCTIONS

You should consider recording specific instructions regarding the place and manner of burial in the event of your death. Upon mobilization such instructions should be left with your spouse or family.

## ☐ IMPORTANT DOCUMENT STORAGE

You should consult with a lawyer about the advisability of storing important documents and small items in a safety deposit box.

